Military Market

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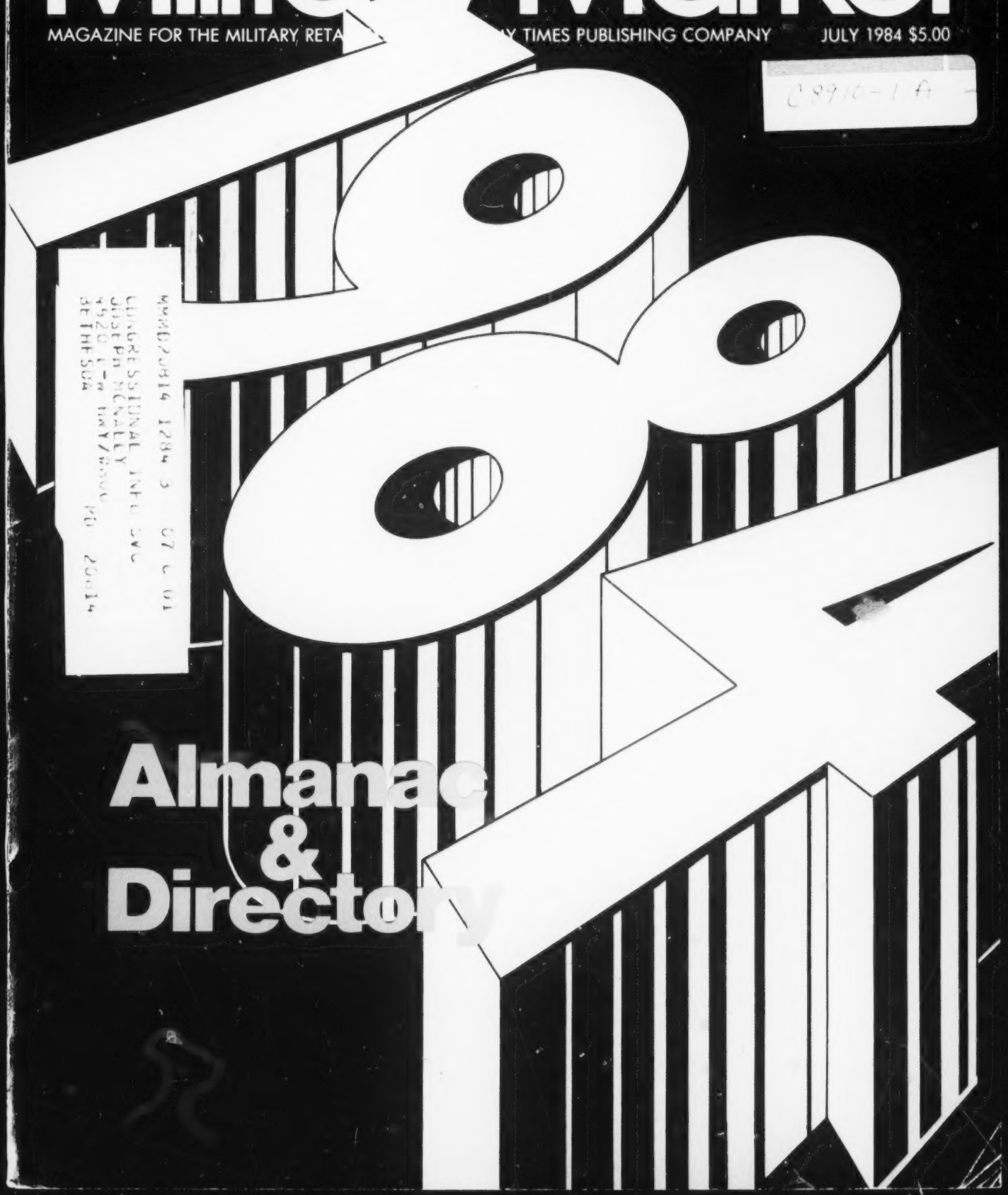

Almanac & Directory

Military Market serving the military retail system

JULY 1984/VOLUME 35/NO. 7
Army Times Publishing Company
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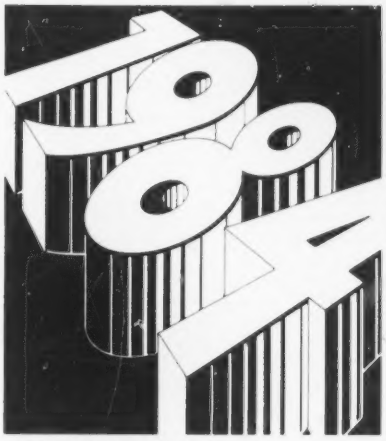

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coming

August: Holiday Preview, Audio, Coast Guard
September: Military Distributors, Candy/Gum, MCEX
October: Coupons, Tobacco, H&BA, AFCOMS
November: Warehousing, Dairy, BB&L, AAFES

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Military Market survey

Couponing Redemptions Up

Managers report minimal fraud, need for uniformity

COUPONING IS INCREASING in all of the commissary systems, according to the results of this month's survey. Nineteen of the 20 commissary managers contacted tell MILITARY MARKET that coupon redemptions are dramatically up in their stores. The one manager who said couponing had stayed the same nevertheless noted that over the last five years the general trend has been upward.

"We get bales and bales of 'em in here. Sometimes we get so many they get in the way of walking around the office. It's great for business and great for the customer, but there are times when it's a real hassle to deal with them at all," remarked a TSA store manager.

Most commissary managers fingered current national economic conditions as the reason for the surge in customer couponing. "It's clear that today's commissary shopper is trying to stretch their food dollar as far as it will go, and clipping coupons is one sure way of doing just that," said one Navy commissary manager.

Other factors, such as the growing consumer awareness of the value offered by couponing and the fact that many companies are stressing coupons to a greater extent, were also cited. An overwhelming majority — 18 of the 20 managers — also believed that coupons offer an opportunity for the patron to "beat the surcharge."

"I hadn't really thought of it like that before, but that's excatly what they're doing. Saving 5 percent is probably quite easy for the average couponer," said another manager.

Household items, frozen foods, pet foods and prepared foods were at the top of the list of product categories that boast the highest redemptions in most commissaries. One trend that also appeared to be increasing is for manufacturers to place coupons directly on the shelves near a product, or else directly on the product.

"We have found that this really gets the customer's attention. For example, large bags of dog food practically flew out of the store the week that the manufacturer placed a coupon display on the shelf." said one AFCOMS store manager. "We like to encourage this sort of activity."

Managers were evenly divided, with 10 saying military publications were the source of most coupons, and another 10 citing civilian publications, particularly Sunday newspapers. Eighteen managers said they would like to see even more couponing in the future. "They are just as good as money as far as I'm concerned," said a Navy store manager.

Coupon fraud appears to be a not very serious problem within the commissaries, with 15 managers reporting it represented no problem at all, and five saying the problem was very small. "We had an incident where one cashier was helping some friends out with coupons. But now I think everyone realizes that such practices are no different from any other kind of fraud, and you can lose your job."

A unanimous 20 managers agreed that they would like to see coupons become more standardized in the future, with UPC codes for scanning as well. "I would also suggest that the expiration dates be printed larger and bolder and in the same spot on each coupon. Sometimes you need a magnifying glass to see those little jaspers," said a TSA commissary manager."

Coupon exchange boxes are a fixture at 15 of the commissaries surveyed, and are also often located at wives clubs and other community organizations on military installations.

Twelve of the store managers were quick to point out that coupons can increase customer satisfaction, and eight of them said the cents-off certificates can readily increase a store's sales. "Coupons are a marketing strategy that really works. I've watched people go out of their way to seek out the specific products that they hold coupons for. Even advertising can't always make that claim," concluded another commissary manager. MM

1 — WITHIN THE LAST YEAR, HAS THE USE OF COUPONS GONE UP, DOWN OR STAYED THE SAME FOR YOUR STORE? Up — 19. Down — 0. Same — 1.

2 — WHAT POSSIBLE FACTORS DO YOU SUPPOSE ACCOUNT FOR THIS CHANGE? Consumer awareness is growing — 5. Economic considerations — 10. Companies are stressing couponing more — 5.

3 — DO YOU BELIEVE A COMMISSARY PATRON CAN "BEAT THE SURCHARGE" BY USING COUPONS? Yes — 18. No — 2.

4 — WHAT PRODUCT CATEGORIES HAVE THE HIGHEST COUPON REDEMPTION IN YOUR STORE?* Breakfast cereals — 0. Coffee — 2. Frozen Foods — 4. Pet foods — 5. Prepared foods — 3. Household items: paper products, soap, etc. — 9. Dairy — 0. Cigarettes — 3. Other — 1.

5 — WHAT IS THE SOURCE OF MOST OF THE COUPONS REDEEMED AT YOUR STORE? Military publications — 10. Civilian publications — 10. From the mail — 0. In-store handouts, on-shelf displays, etc. — 0.

6 — WOULD YOU LIKE TO SEE EVEN MORE COUPONS ISSUED? Yes — 18. No — 2.

7 — HOW MUCH OF A PROBLEM HAS COUPON FRAUD BEEN FOR YOUR STORE? DO YOU FEEL THAT THIS PRACTICE IS GROWING? Very small — 5. No problem — 15.

8 — THE GROCERY MANUFACTURERS' ASSOCIATION RECENTLY COMPLETED A STUDY CONCERNING COUPONING AND MADE SOME RECOMMENDATIONS FOR THE FUTURE. AMONG THESE WERE THAT COUPONS BE STANDARDIZED IN TERMS OF SHAPE, SIZE AND CONTENT. WOULD YOU LIKE TO SEE COUPONS STANDARDIZED? Yes — 20. No — 0.

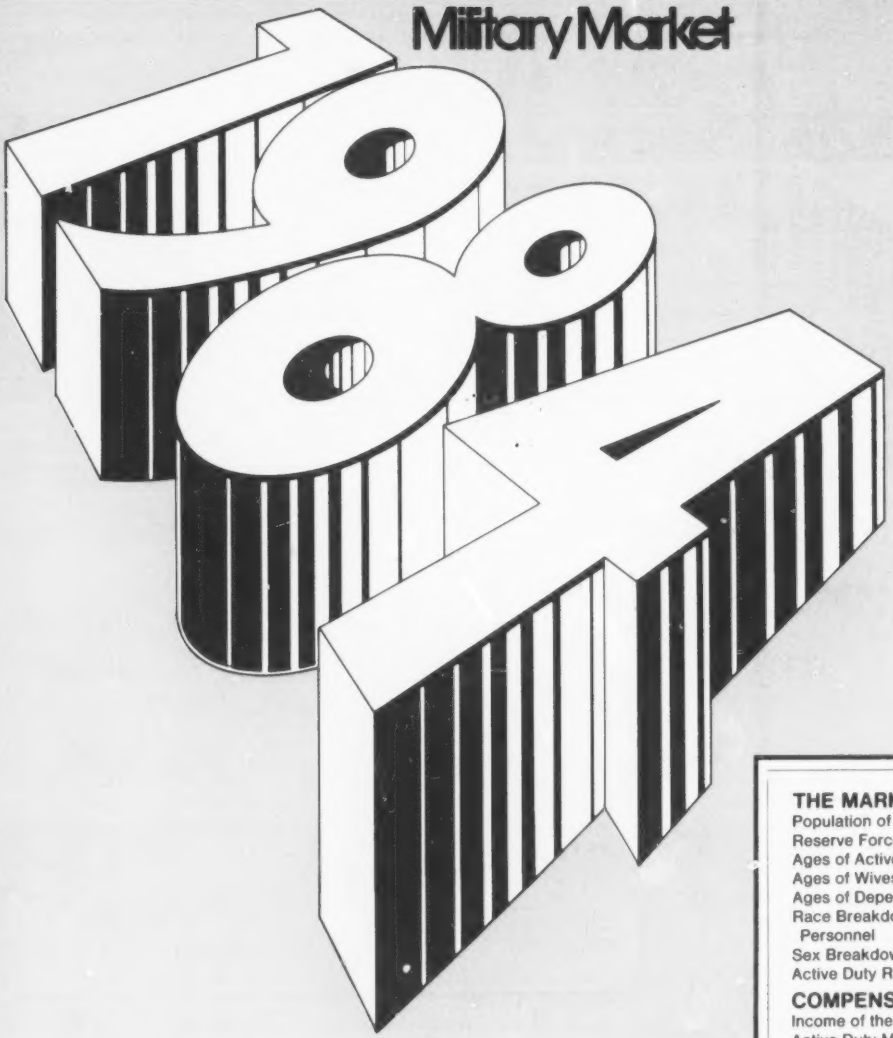
9 — WOULD YOU LIKE TO SEE COUPONS BECOME SCANNABLE WITH UPC CODES? Yes — 20. No — 0.

10 — WHAT ADVANTAGES DO COUPONS OFFER TO YOU, AS A STORE MANAGER? Increased sales — 8. Customer satisfaction — 12. Identify slow movers — 0. Reduce high inventories — 0.

11 — DO YOU OFFER NOW (OR ARE YOU PLANNING TO OFFER) A COUPON-EXCHANGE BOX? Yes — 15. No — 5.

*Adds to more than 20 because of multiple responses.

Military Market



The Almanac

Twenty-fifth Annual Statistical Review of the Military Resale Market

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The resale systems' potential customer pool as of March 1984 was made up of more than 11.7 million active duty, retired and reservist military personnel and their dependents. More than half of all active duty personnel are 25 years old or younger, while nearly 38 percent of military customers are retirees or their dependents.

RESERVE FORCES IN PAID STATUS

ARMY NATIONAL GUARD	
Officers	41,678
Enlisted	375,500
Total	**417,178**
ARMY RESERVE	
Officers	49,970
Enlisted	216,218
Total	**266,188**
NAVAL RESERVE	
Officers	20,610
Enlisted	88,474
Total	**109,084**
MARINE CORPS RESERVE	
Officers	3,000
Enlisted	38,005
Total	**41,005**
AIR NATIONAL GUARD	
Officers	12,666
Enlisted	89,482
Total	**102,148**
AIR FORCE RESERVE	
Officers	14,417
Enlisted	52,810
Total	**67,227**
TOTAL DoD RESERVES	
Officers	142,341
Enlisted	860,489
Total	**1,002,830**
COAST GUARD RESERVE*	
Officers	1,564
Enlisted	10,592
Total	**12,156**
TOTAL ALL SERVICES	
Officers	143,905
Enlisted	871,081
Total	**1,014,986**

As of Sept. 30, 1983
*The Coast Guard is part of the Department of Transportation.
SOURCE: Department of Defense and Department of Transportation

POPULATION OF THE MILITARY COMMUNITY

ACTIVE DUTY		
Active duty military	2,176,000	18.6%
Spouses of active duty military	1,154,000	9.8%
Other dependents of active duty	1,630,000	13.9%
Total	**4,960,000**	**42.3%**
RETIREES		
Retired military	1,419,000	12.1%
Spouses of retired military	1,252,000	10.7%
Other dependents of retirees	1,730,000	14.8%
Total	**4,401,000**	**37.6%**
RESERVISTS*		
Reservists in paid status	1,003,000	8.6%
Spouses of reservists	630,000	5.3%
Children of reservists	725,000	6.2%
Total	2,358,000	20.1%
GRAND TOTAL	**11,719,000**	**100%**

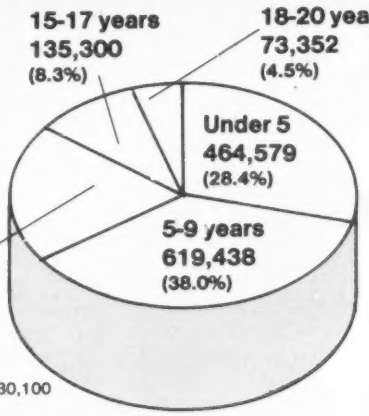
*Does not include Coast Guard reserves
As of March 1984
SOURCE: Personnel Budget for FY 1984

AGE BREAKDOWN OF ACTIVE DUTY MILITARY

	MEN	WOMEN	ALL
Under 21 years	19.7%	19.1%	19.6%
21 — 25 years	34.4%	44.4%	35.3%
26 — 29 years	15.7%	20.3%	16.2%
30 — 35 years	15.9%	12.5%	15.6%
36 — 39 years	7.8%	2.3%	7.3%
40 years and over	6.5%	1.4%	6.0%

As of Sept. 30, 1983
Does not include Coast Guard
SOURCE: DoD Information Operations and Reports and the Pentagon

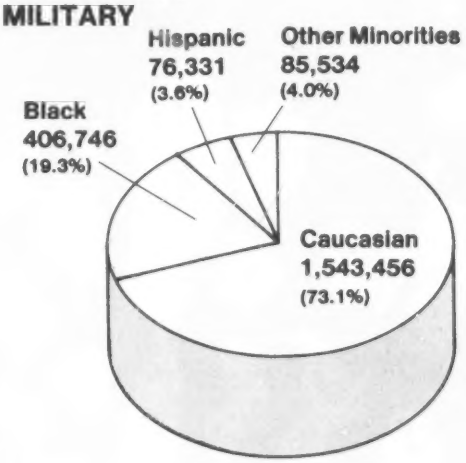
AGE DISTRIBUTION OF DEPENDENT CHILDREN OF ACTIVE DUTY MILITARY PERSONNEL



Total dependent children: 1,630,100
As of March 31, 1984
Includes Coast Guard
SOURCE: Department of Defense and Department of Transportation

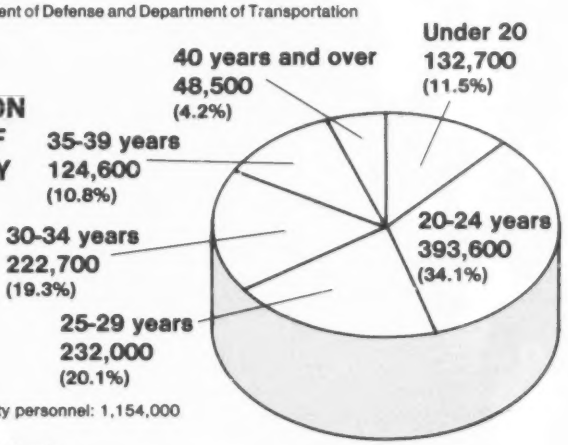
Women made up 9.3 percent of the forces, and blacks, Hispanics and other minorities accounted for 26.9 percent. About 45 percent of all military wives were 24 years old or younger, while two-thirds of military children were less than 10 years old.

RACE BREAKDOWN OF ACTIVE DUTY MILITARY



Total active duty: 2,112,067
As of September 1983
Does not include Coast Guard
SOURCE: Department of Defense

AGE DISTRIBUTION OF WIVES OF ACTIVE DUTY MILITARY

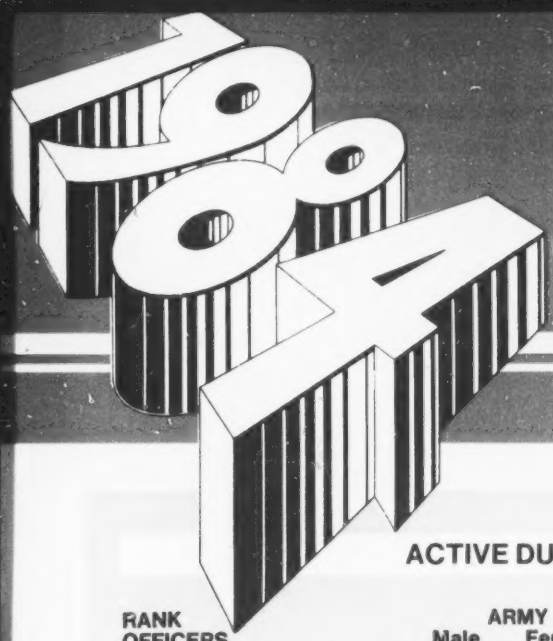


Total wives of active duty personnel: 1,154,000
As of March 31, 1984
Includes DoD and Coast Guard
SOURCE: Department of Defense and Department of Transportation

ACTIVE DUTY MILITARY PERSONNEL BY SEX

	CY 1983	CY 1982	CY 1981	CY 1980	CY 1979
Total active duty	2,123,349	2,108,612	2,082,560	2,050,627	2,027,494
Percent male	90.7	91.0	91.1	91.6	92.6
Percent female	9.3	9.0	8.9	8.4	7.4

As of Sept. 30, 1983
Does not include Coast Guard
SOURCE: Department of Defense



The Market

ACTIVE DUTY MILITARY PERSONNEL BY RANK, SEX AND SERVICE

RANK	ARMY		NAVY		MARINE CORPS		AIR FORCE	
OFFICERS	Male	Female	Male	Female	Male	Female	Male	Female
O-7—O-10	393	2	247	2	65	0	335	3
O-6	4,641	82	3,663	91	587	5	5,343	77
O-5	10,406	301	7,363	305	1,560	32	12,185	334
O-4	15,367	1,099	11,713	1,062	2,995	62	18,223	930
O-3	30,363	3,960	17,839	2,347	5,126	142	33,877	4,616
O-2	10,601	2,066	9,344	1,240	4,423	188	12,597	2,627
O-1	9,675	1,794	9,005	1,234	3,239	159	11,436	1,973
WARRANT OFFICERS	14,738	186	3,020	19	1,365	35	0	0
TOTAL OFFICERS	96,184	9,490	62,194	6,300	19,360	623	93,996	10,560
ENLISTED								
E-9	4,128	17	3,723	8	1,234	9	4,818	13
E-8	15,699	133	8,770	44	3,715	30	9,638	29
E-7	49,085	1,058	29,224	338	8,873	129	34,957	259
E-6	80,496	4,481	64,947	2,495	14,667	435	52,722	1,815
E-5	106,240	12,783	87,414	8,605	24,830	1,563	93,537	11,996
E-4	143,557	22,558	92,942	11,174	30,313	2,087	85,766	18,877
E-3	99,542	13,876	84,926	11,080	42,466	2,207	108,755	15,815
E-2	44,896	5,238	40,226	4,074	24,751	1,215	19,732	3,336
E-1	59,689	5,888	31,919	2,659	14,984	598	18,320	2,637
TOTAL ENLISTED	603,332	66,032	444,091	40,477	165,833	8,273	428,245	54,777
CADETS AND MIDSHIPMEN	4,102	503	4,196	315	0	0	3,938	528
GRAND TOTAL	703,618	76,025	510,481	47,092	185,193	8,896	526,179	65,865

RANK	COAST GUARD		TOTAL ALL SERVICES				TOTAL DOD		
OFFICERS	Male	Female	Total	Male	Female	Total	Male	Female	Total
O-7—O-10	28	0	28	1,068	7	1,075	1,040	7	1,047
O-6	343	0	343	14,577	255	14,832	14,234	255	14,489
O-5	630	0	630	32,144	972	33,116	31,514	972	32,486
O-4	937	5	942	49,235	3,158	52,393	48,298	3,153	51,451
O-3	1,509	36	1,545	88,714	11,101	99,815	87,205	11,065	98,270
O-2	1,054	67	1,121	38,019	6,188	44,207	36,965	6,121	43,086
O-1	428	41	469	33,783	5,201	38,984	33,355	5,160	38,515
WARRANT OFFICERS	1,456	1	1,457	20,579	241	20,820	19,123	240	19,363
TOTAL OFFICERS	6,385	150	6,535	278,119	27,123	305,242	271,734	26,973	298,707
ENLISTED									
E-9	316	0	316	14,219	47	14,266	13,903	47	13,950
E-8	502	1	503	38,324	237	38,561	37,822	236	38,058
E-7	2,637	10	2,647	124,776	1,794	126,570	122,139	1,784	123,923
E-6	5,032	127	5,159	217,864	9,353	227,217	212,832	9,226	222,058
E-5	4,878	336	5,214	316,889	35,283	352,182	312,021	34,947	346,968
E-4	6,227	474	6,701	358,805	55,170	413,975	352,578	54,696	407,274
E-3	5,357	342	5,699	341,046	43,320	384,366	335,689	42,978	378,667
E-2	4,380	624	5,004	133,985	14,487	148,472	129,605	13,863	143,468
E-1	984	135	1,119	125,896	11,917	137,813	124,912	11,782	136,694
TOTAL ENLISTED	30,313	2,049	32,362	1,671,814	171,608	1,843,422	1,641,501	169,559	1,811,060
CADETS AND MIDSHIPMEN	706	105	811	12,942	1,451	14,393	12,236	1,346	13,582
GRAND TOTAL	37,404	2,304	39,708	1,962,875	200,182	2,163,057	1,925,471	197,878	2,123,349

As of Sept. 30, 1983 SOURCE: Department of Defense and Department of Transportation

Compensation

INCOME OF THE MILITARY COMMUNITY FY 1984

Active duty military, total	**$63.4 billion**
Military pay, allowances, benefits	56.3 billion
"Moonlighting" and working spouses' income	7.1 billion
Retired military, total	**$47.6 billion**
Pensions	16.8 billion
2nd career jobs	22.8 billion
Working spouses' income	8.0 billion
Reservists in paid status, total	**$29.8 billion**
Employment income	20.2 billion
Working spouses' income	5.5 billion
Reserve training pay	4.1 billion
Total income of military community	**$140.8 billion**

SOURCE: DoD Personnel Budget for FY 1984

AVERAGE MILITARY COMPENSATION OVER THE LAST EIGHT YEARS

FY 1977	$14,398
FY 1978	15,367
FY 1979	16,594
FY 1980	18,420
FY 1981	20,546
FY 1982	23,538
FY 1983	24,656
FY 1984	25,902

SOURCE: DoD Personnel Budgets for the years shown

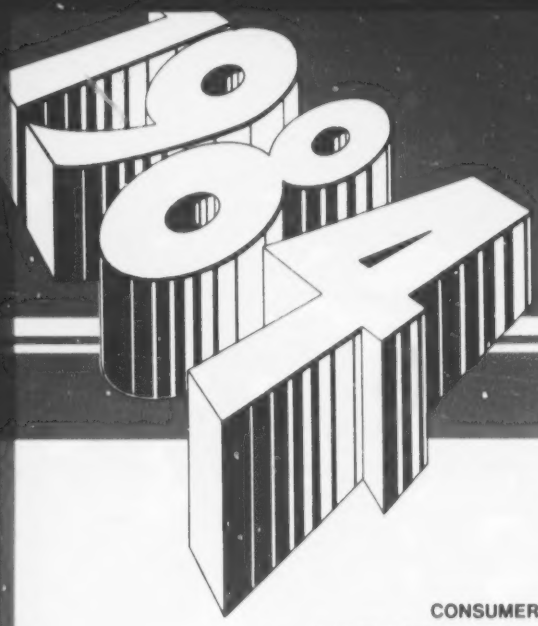
FY 1984 ACTIVE DUTY MILITARY ANNUAL COMPENSATION

Average military compensation	**$25,902***
Regular military compensation	$18,240
Basic pay	13,381
Basic allowance for quarters	1,708
Subsistence allowance & costs	1,770
Variable housing allowance	331
Federal income tax advantage	1,050
Special pays and consumption advantages	$7,662
Special allowances	$679
Special & incentive pays, bonuses	970
Commissary & exchange savings	798
Free/reduced cost medical/dental care	1,116
Retirement credit for current year's service	3,213
Social security payments (government contributions)	886

* Annual rate, including value of fringe benefits and consumption advantages.

SOURCE: DoD Personnel Budget for FY 1984

The average annual compensation for active duty military rose 5.1 percent to $25,902. At the same time, all-sources income for the resale systems' pool of potential customers rose 5.5 percent to $140.8 billion.



Exchanges

CATEGORY	WORLDWIDE DOLLAR SALES	WORLDWIDE PERCENTAGE	DOMESTIC DOLLAR SALES	DOMESTIC PERCENTAGE	OVERSEAS DOLLAR SALES	OVERSEAS PERCENTAGE
CONSUMER ELECTRONICS	$632.2	12.2	$210.8	6.2	$421.4	23.4
TOBACCO PRODUCTS (INCL. VENDING)	391.0	7.5	313.0	9.2	78.0	4.3
FOOD, JUICES, CONFECTIONS	378.8	7.3	261.2	7.7	117.6	6.5
MILITARY UNIFORMS (INCL. DPSC)	302.7	5.8	238.6	7.0	64.1	3.6
HEALTH & BEAUTY AIDS	281.5	5.4	199.4	5.9	82.1	4.6
STATIONERY & GREETING CARDS	241.7	4.7	179.2	5.3	62.5	3.5
BEER & SODA	240.8	4.6	138.0	4.1	102.8	5.7
MEN'S FURNISHINGS	214.1	4.1	155.6	4.6	58.5	3.3
FOOTWEAR	174.8	3.4	129.7	3.8	45.2	2.5
TRAFFIC & MAJOR APPLIANCES	169.1	3.3	106.7	3.1	62.3	3.5
WOMEN'S OUTERWEAR	160.8	3.1	110.6	3.3	50.2	2.8
PHOTOGRAPHY & OPTICAL	151.1	2.9	86.0	2.5	65.1	3.6
JEWELRY (INCL. FINE JEWELRY)	123.4	2.4	83.1	2.5	40.3	2.2
MEN'S OUTERWEAR	122.2	2.4	82.2	2.4	40.0	2.2
WOMEN'S FURNISHINGS	117.3	2.3	92.1	2.7	25.2	1.4
AUTOMOBILE ACCESSORIES	115.8	2.2	76.5	2.2	39.3	2.2
TOYS, GAMES & BICYCLES	106.1	2.0	65.8	1.9	40.3	2.2
RECORDED SOUND & VIDEO	105.6	2.0	47.5	1.4	58.2	3.2
GARDEN/PATIO FURNITURE/ACCESSORIES	105.1	2.0	92.1	2.7	13.0	0.7
HARDWARE	104.3	2.0	84.9	2.5	19.7	1.1
COSMETICS & FRAGRANCES	101.0	1.9	76.3	2.3	24.7	1.4
LINENS & DOMESTICS	99.6	1.9	68.5	2.0	31.2	1.7
SPORTING GOODS	87.1	1.7	61.4	1.8	25.8	1.4
GIFTWARE (AAFES ONLY)	76.5	1.5	43.4	1.4	30.1	1.7
FURNITURE & RUGS	76.3	1.5	28.9	0.9	47.4	2.6
INFANTS' & TODDLERS' WEAR	70.4	1.4	48.9	1.4	21.5	1.2
CLEANING SUPPLIES	67.2	1.3	46.6	1.4	20.6	1.1
KITCHENWARE	64.8	1.3	47.1	1.4	17.7	1.0
BOYS' WEAR	59.0	1.1	41.2	1.2	17.8	1.0
WATCHES	55.4	1.1	38.3	1.1	17.1	1.0
GIRLS' WEAR	48.5	0.9	31.8	0.9	16.6	0.9
LUGGAGE	44.9	0.9	32.3	1.0	12.5	0.7
YARDAGE & SEWING GOODS	41.3	0.8	24.6	0.7	16.7	0.9
FILM & PHOTOFINISHING	34.7	0.7	28.7	0.8	6.1	0.3
DINNERWARE & FLATWARE	34.0	0.7	23.6	0.7	10.3	0.6
*TOTAL RETAIL DEPARTMENTS	$5,200.5	100.0	$3,400.5	100.0	$1,802.1	100.0

A category-by-category breakdown of sales in exchanges during CY 1983. Sales are shown in millions and percentage share of total sales.

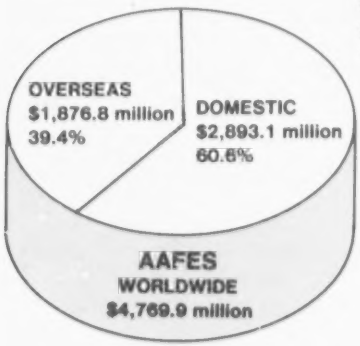
*Does not include sales from services.
Domestic sales include Alaska and Hawaii.
NOTE: Because of rounding, items may not add up to totals.
SOURCE: Sales from department reports of AAFES, NAVRESSO and Veterans Administration Canteen Service.
Marine Corps and Coast Guard department sales are estimated, based on NAVRESSO and AAFES percentage distributions.

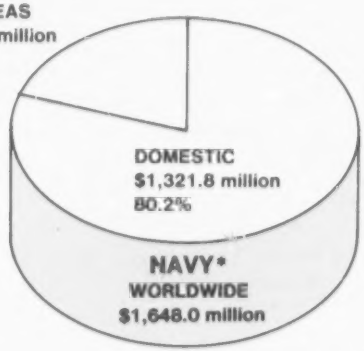
PERCENT OF EXCHANGE SALES BY SYSTEM WORLDWIDE CY 1983

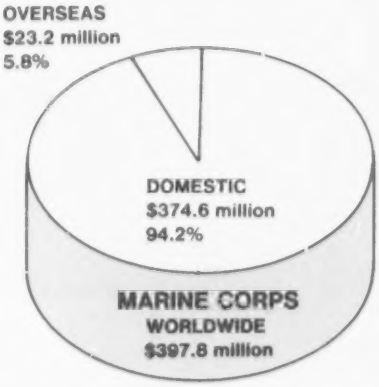
	WORLDWIDE SALES	PERCENT OF TOTAL SALES
AAFES	$4,769.9 million	67.3
NAVY	1,648.0 million	23.3
MARINE CORPS	397.8 million	5.6
COAST GUARD	88.1 million	1.3
VCS	179.5 million	2.5
TOTAL	$7,083.3 million	100

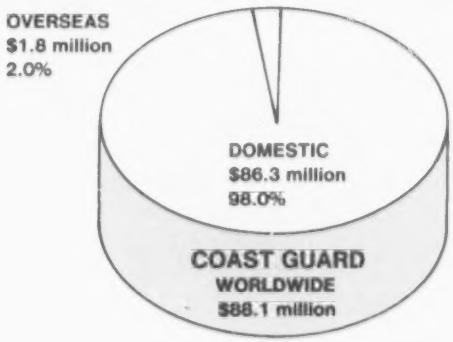
SOURCE: Resale systems' headquarters

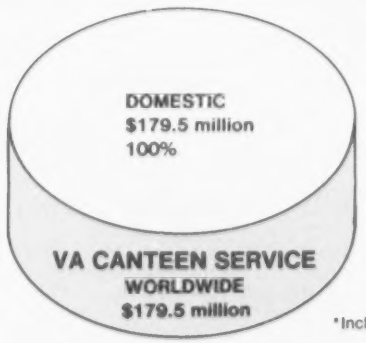
Total exchange sales were more than $7 billion in CY 1983. Domestic exchange sales accounted for 68.5 percent of total sales; overseas sales were 31.5 percent of total sales.











Domestic sales include Alaska and Hawaii
*Includes sales of ships stores.

SALES GROWTH

SOURCE: Resale systems' headquarters

1984 Commissaries

A category-by-category breakdown of sales in commissaries during CY 1983. Sales (includes 5 percent surcharge) are shown in millions and percentage share of total sales.

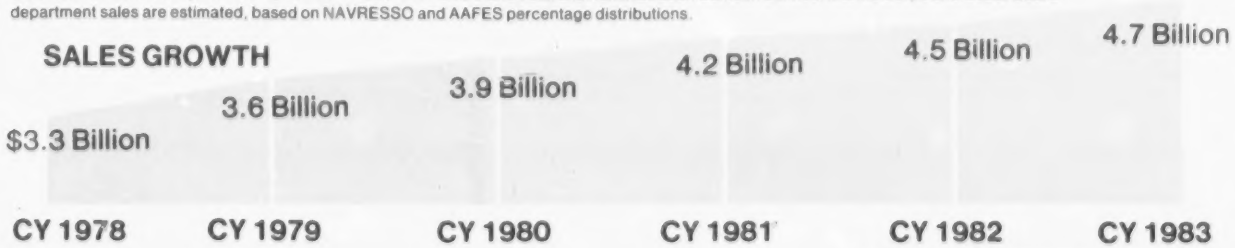
CATEGORY	WORLDWIDE DOLLAR SALES	WORLDWIDE PERCENTAGE	DOMESTIC DOLLAR SALES	DOMESTIC PERCENTAGE	OVERSEAS DOLLAR SALES	OVERSEAS PERCENTAGE
FRESH & CURED MEAT, POULTRY & SEAFOOD	$1,162.2	24.7	$958.3	24.7	$203.9	24.7
DAIRY PRODUCTS	418.7	8.9	350.4	9.0	68.3	8.3
HOUSEHOLD SUPPLIES	419.2	8.9	337.9	8.7	81.3	9.8
CANNED FOODS	404.6	8.6	325.5	8.4	79.1	9.5
FROZEN FOODS	356.7	7.6	305.3	7.9	51.4	6.2
*TOBACCO PRODUCTS	285.1	6.1	242.9	6.3	42.2	5.1
BAKED GOODS	275.3	5.8	231.2	6.0	44.1	5.3
PRODUCE	216.4	4.6	178.5	4.6	37.9	4.6
PREPARED BEVERAGES	159.5	3.4	127.6	3.3	31.9	3.9
HEALTH & BEAUTY AIDS	139.3	2.9	114.9	2.9	24.4	3.0
BAKING NEEDS	137.4	2.9	112.9	2.9	24.5	3.0
PET FOODS	130.4	2.8	103.6	2.7	26.8	3.3
CEREALS	96.9	2.1	75.6	1.9	21.3	2.6
BABY FOODS	70.6	1.5	58.3	1.5	12.3	1.5
DRIED FRUITS, VEGETABLES & NUTS	56.5	1.2	46.6	1.2	9.9	1.2
SAUCES	48.5	1.0	40.0	1.0	8.5	1.0
**SOFT DRINKS (NOT STOCKED BY NAVY)	46.6	1.0	39.2	1.0	7.4	0.9
SPREADS	44.2	0.9	36.5	0.9	7.7	1.0
CANDY & CHEWING GUM	42.8	0.9	36.1	0.9	6.7	0.8
DRESSINGS	41.9	0.9	33.4	0.9	8.5	1.0
PASTA PRODUCTS	30.1	0.6	24.8	0.6	5.3	0.6
DESSERTS & TOPPINGS	29.6	0.6	24.0	0.6	5.6	0.6
PICKLES, OLIVES & VINEGAR	27.8	0.6	22.9	0.6	4.9	0.6
SPICES & EXTRACTS	26.4	0.6	21.7	0.6	4.7	0.6
DIETETIC & LOW CALORIE	23.5	0.5	19.4	0.5	4.1	0.5
SYRUP	13.6	0.3	11.0	0.3	2.6	0.3
MISCELLANEOUS	1.5	0.1	1.1	0.1	0.4	0.1
TOTAL DEPARTMENTS	$4,705.3	100.0	$3,879.6	100.0	$825.7	100.0

Domestic sales include Alaska and Hawaii.
NOTE: Because of rounding, items may not add up to totals.

*Tobacco products as a percentage of total sales are computed including sales of Navy and Marine Corps commissaries, although Marine Corps commissaries do not stock tobacco products. However, tobacco products were sold in four Navy commissaries during 1983, three on a test basis and one permanently; these sales are not included in the totals above. When computed as a percentage of sales of just Army and Air Force stores, tobacco products are 7.6 percent of worldwide sales, 7.9 percent of domestic sales and 6.1 percent of overseas sales.

**Soft drinks are stocked in only four Navy commissaries; sales are not included in the totals above.

SOURCE: Sales from department reports of AAFES, NAVRESSO and Veterans Administration Canteen Service. Marine Corps and Coast Guard department sales are estimated, based on NAVRESSO and AAFES percentage distributions.

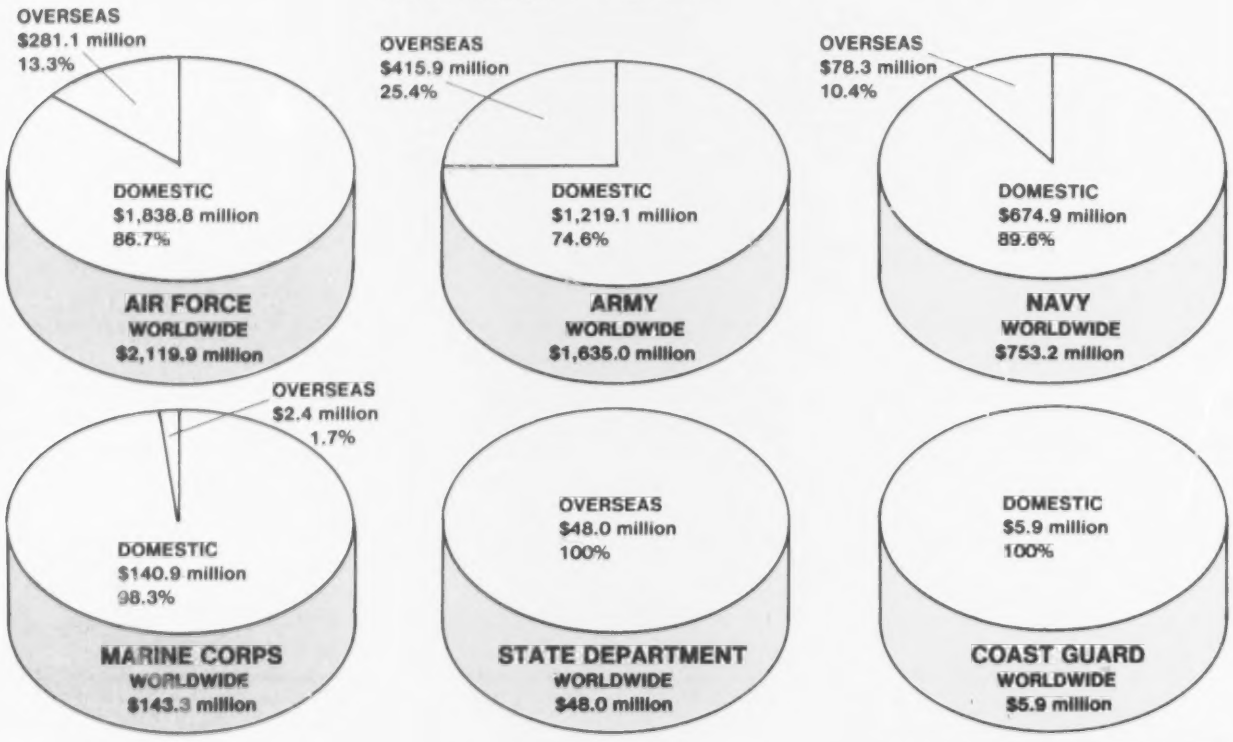


SOURCE: Resale systems' headquarters

PERCENT OF COMMISSARY SALES BY SYSTEM WORLDWIDE CY 1983

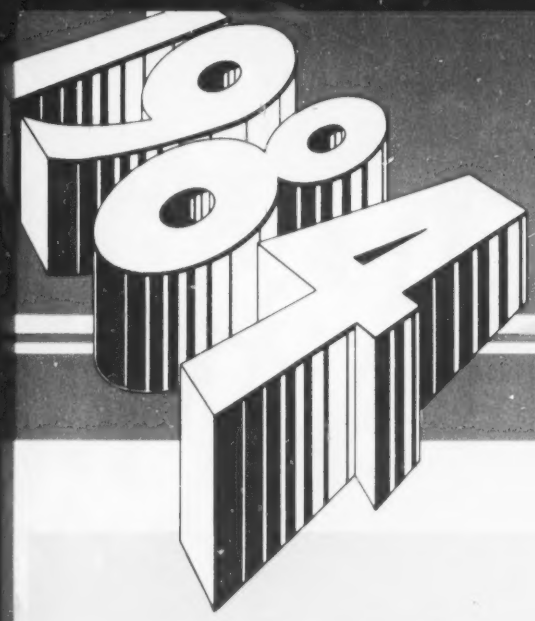
	WORLDWIDE SALES	PERCENT OF TOTAL SALES
AIR FORCE	$2,119.9 million	45.1
ARMY	1,635.0 million	34.8
NAVY	753.2 million	16.0
MARINE CORPS	143.3 million	3.0
COAST GUARD	5.9 million	0.1
STATE DEPARTMENT	48.0 million	1.0
TOTAL	**$4,705.3 million**	**100**

SOURCE: Resale systems' headquarters



Domestic sales include Alaska and Hawaii

By year end 1983 total commissary sales had surpassed $4.5 billion. Overall, 82.4 percent of commissary sales originated in domestic outlets. Only 17.6 percent of the sales were rung up in overseas commissaries.



The Market's Retail Sales

LARGEST SUPERMARKET CHAINS

	1983	1982
1 — Safeway	$18.6	$17.6
2 — Kroger	15.2	11.9
3 — Lucky	8.4	8.0
4 — American Stores	8.0	7.5
5 — Winn-Dixie	7.0	6.8
6 — Jewel	5.7	5.6
7 — A & P	5.2	4.6
8 — Worldwide Commissaries	**4.7**	**4.5**
9 — Albertson	4.3	3.9
10 — Domestic Commissaries	**3.9**	**3.7**

$ in billions

SOURCE: Civilian supermarket sales as reported in the May 1984 issue of *Progressive Grocer*. Military commissary sales are as reported by the headquarters offices of the various commissary systems. Commissary sales include the 5 percent surcharge.

LARGEST DEPARTMENT/VARIETY STORE CHAINS

	1983	1982
1 — Sears	$20.4	$18.8
2 — K mart	18.6	16.8
3 — J.C. Penney	12.1	11.4
4 — Federated Department Stores	7.2	6.4
5 — Worldwide Military Exchanges	**7.1**	**6.9**
6 — Dayton-Hudson	7.0	5.7
7 — Montgomery Ward	6.0	5.6
8 — Woolworth	5.4	5.1
9 — Domestic Military Exchanges	**4.9**	**4.5**

$ in billions

SOURCE: Sales of civilian department store chains are as reported by "Annual 'Yardstick' Report: The Top 100 Chains," *Chain Store Age, General Merchandise Edition*, June 1984. Military Exchange sales are as reported by the headquarters offices of the various exchange systems.

COMBINED COMMISSARY AND EXCHANGE SALES

CY 1977
$7,454 million

CY 1978
$8,123 million

CY 1979
$8,890 million

CY 1980
$9,863 million

CY 1981
$10,640 million

CY 1982
$11,354 million

CY 1983
$11,788.6 million

COMMISSARIES	$4,705.3 million	40%
EXCHANGES*	$7,083.3 million	60%
TOTAL	**$11,788.6 million**	**100%**

*Includes sales by mail order, catalog, concessions, food service, personnel services, etc.

Combined CY 1983 sales for commissaries and exchanges were more than $11.5 billion. Worldwide commissaries remained in eighth place, while domestic commissaries moved up to the No. 10 spot, after Grand Union's fall from the top 10. Worldwide military exchanges dropped to fifth place, their sales being surpassed by Federated Department Stores. Domestic military exchanges held steady in ninth place.

Military Market index

Commissaries

		APRIL			YEAR-TO-DATE		
		CY'84	CY'83	%	CY'84	CY'83	%
Air Force	CONUS	$165,683	$160,886	+2.98	$452,898	$429,588	+5.43
	OVERSEAS	32,217	31,829	+1.22	88,100	86,010	+2.43
	TOTAL	**197,900**	**192,715**	**+2.69**	**540,998**	**515,598**	**+4.93**
Army	CONUS	112,245	108,680	+3.28	312,060	307,112	+1.61
	OVERSEAS	39,165	35,672	+9.79	106,575	102,544	+ 3.93
	TOTAL	**151,410**	**144,352**	**+4.89**	**418,635**	**409,656**	**+2.19**
Navy	CONUS	72,776	49,454	+47.16	181,377	147,254	+23.17
	OVERSEAS	8,602	5,762	+49.29	21,123	17,007	+24.20
	TOTAL	**81,378**	**55,216**	**+47.38**	**202,500**	**164,261**	**+23.28**
Marines	CONUS	13,596	12,189	+11.54	38,872	33,828	+14.91
	OVERSEAS	210	197	+ 6.60	557	538	+3.53
	TOTAL	**13,806**	**12,386**	**+11.46**	**39,429**	**34,366**	**+14.73**
Coast Guard	CONUS	263	317	-17.03	724	862	-16.01
	OVERSEAS	240	161	+49.07	758	554	+36.82
	TOTAL	**503**	**478**	**+5.23**	**1,482**	**1,416**	**+4.66**
All Commissaries	CONUS	364,563	331,526	+9.97	985,931	918,644	+7.32
	OVERSEAS	80,434	73,621	+9.25	217,113	206,653	+ 5.06
	TOTAL	**$444,997**	**$405,147**	**+9.84**	**$1,203,044**	**$1,125,297**	**+6.91**
Grocery Stores	U.S.[1]	**$21.557 bil.**	**$19.865 bil.**	**+8.52**	**$61.071 bil.**	**$56.635 bil.**	**+7.83**

Exchanges

AAFES	CONUS	$229,789	$221,807	+3.60	$626,844	$606,475	+3.36
	OVERSEAS	156,268	154,077	+1.42	439,007	434,141	+1.12
	TOTAL	**386,057**	**375,884**	**+2.71**	**1,065,851**	**1,040,616**	**+2.43**
Navy	CONUS[2]	85,717	82,908	+3.39	227,610	223,866	+1.67
	OVERSEAS[2]	35,387	36,700	-3.58	97,999	98,579	-0.59
	TOTAL[2]	**121,104**	**119,608**	**+1.25**	**325,609**	**322,445**	**+0.98**
Marines	CONUS	28,447	29,441	-3.38	77,303	76,702	+0.78
	OVERSEAS	4,724	4,974	- 5.03	13,412	14,559	-7.88
	TOTAL	**33,171**	**34,415**	**-3.61**	**90,715**	**91,261**	**-0.60**
Coast Guard	CONUS[3]	6,176	5,989	+3.12	16,735	16,227	+3.13
	OVERSEAS[3]	765	817	-6.36	2,078	2,212	-6.06
	TOTAL[3]	**6,941**	**6,806**	**+1.98**	**18,813**	**18,439**	**+2.03**
Mail Order	CONUS[4]	1,324	1,056	+25.38	4,506	4,014	+12.26
	OVERSEAS[4]	4,022	3,426	+17.40	12,088	12,011	+0.64
	TOTAL[4]	**5,346**	**4,482**	**+19.28**	**16,594**	**16,025**	**+3.55**
All Exchanges	CONUS	351,453	341,201	+3.00	952,998	927,284	+2.77
	OVERSEAS	201,166	199,994	+0.59	564,584	561,502	+0.55
	TOTAL	**$552,619**	**$541,195**	**+2.11**	**$1,517,582**	**$1,488,786**	**+1.93**
Department Stores	U.S.[1]	**$9.219 bil.**	**$8.479 bil.**	**+8.73**	**$23.943 bil.**	**$21.319 bil.**	**+12.31**

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ships stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard.

Individual figures may not add to totals because of rounding. All sales are expressed in millions (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges, and exchange sales include concession volume.

NOTE: The MM Index for February (appearing in the June 1984 issue) is in error. The wrong data were used for Army commissaries. March sales data were used in place of February's. The figures should have read:

Army	CONUS	97,650	90,168	+8.30	199,815	198,432	+0.70
	OVERSEAS	30,240	26,936	+12.27	67,410	66,872	+0.80
	WORLDWIDE	127,890	117,104	+9.21	267,225	265,304	+0.72
All Commissaries	CONUS	310,651	281,593	+10.32	621,368	587,117	+5.83
	OVERSEAS	65,527	59,981	+9.25	136,679	133,031	+2.74
	WORLDWIDE	376,178	341,574	+10.13	758,047	720,148	+5.26